

Attaching a Document to a PERSACTION

PERSACTION allows you to attach almost any type of document to a personnel action. The procedure described in this section is for attaching documents from Microsoft Word or other programs using object linking and embedding (OLE). Attached documents can be either existing documents or documents that you create during the attachment process. One of the primary uses for this function is to attach a position description that you have downloaded from PD Library (see PD LIBRARY).

Attaching a document to a personnel action is not the same process as attaching a core document; see Attaching a Core Document to a personnel action.

Once you attach a document to a personnel action, it travels with the document just like a note or a core document. Anyone who subsequently receives the personnel action will be able to access and modify the document if their computer is configured to support the attached document through OLE (in other words, if there is a Microsoft Word document attached to the personnel action, the recipient must have access to Microsoft Word to view or use the document).

If you receive a personnel action in your inbox that has a document attached there will be a "Y" under the "A" in the "*NCSA" column at the right side of the inbox. To view the attached document, click on the <Attach Doc> button. If there is more than one document attached, use the <Previous> and <Next> buttons to see the other documents. When you are done reviewing the document(s), click the <OK> button to exit and return to the inbox.

Attached documents are stored as part of the FPI database. For this reason, you should limit the size of attachments so the database does not get overly large. Also, large documents will cause delays when being accessed from remote (non-CPOC) locations.

- At the inbox screen, click on (highlight) the personnel action to which you want to attach a document.
- Click on the <Attach Doc> button at the bottom of the inbox screen.
- Click the <Add> button at the bottom of the "Attach Document" screen.

Your user name will automatically be filled in at the top of the screen ("Attached By").

- Click on the "Description" box and enter a brief description of the document you are attaching (e.g., "Position Authorization").
- Move the mouse cursor into the large white screen area, then click the right mouse button.
- Select "Insert Object" from the pop-up menu. This will display the "Insert Object" menu.

You can insert either an existing document or create a new document to attach. Instructions for both procedures follow.

Attaching an Existing Document

- Click on the "Create from File" button.
- If you know the file name (and drive and directory location) of the file you want to attach, type it in the "File:" area, then click <OK>.

If you are not sure of the document name or location, use the "Browse" button to display the standard Windows browse dialog box. From this window you can navigate through the drives and directories available to you (including network drives) and locate the desired document. Once you have located and selected the document, click <OK> on the browse window.

- Click <OK> on the "Insert Object" window. This will display the selected document.
- Click <OK> on the "Attached Documents" window to return to the inbox.

Creating and Attaching a New Document

- With the "Create New" button active, select the type of document you want to create from the list of programs. You may have to scroll through the box to locate the desired program. For instance, select Microsoft Word document to create a Word document. You must have access to the software program (e.g., Microsoft Word) to select it.
- Click <OK> to enter the program (e.g., Microsoft Word) where you can create the document.
- When you are done creating the document, use the "File" and "Save Copy As" menus to save the document to your local computer (if desired). When you exit from the program, the document will automatically be attached to the personnel action.

- Click <OK> on the "Attached Documents" window to return to the inbox.